

**University Forms Inventory List  
(For Digital Signature Solutions Project)**

Type	Division	Form Title	Form Action	Financial, HR, CS, Security Action
Institutional Form	Gen Counsel	SAM and MAPP policies	Approves policy change	None
Institutional Form	HR	Taleo Access	Approves Systems Access	Security access
Institutional Form	Finance	Cash Handling and Change Fund Authorization	Approves persons to handle cash/equivalents	Allows cash handling
Institutional Form	Finance	Request for Chartfield Acton - Department	Support to create Department	Modifies chartfields
Institutional Form	Finance	Request for Chartfield Action - Project/Grant Form	Support to create Project/Grant	Modifies chartfields
Institutional Form	Finance	DataWareHouse	Give access to data warehouse information and tools	Systems Access
Institutional Form	Finance	Request for Chartfield Action - Account	Support to create Accounts	Modifies chartfields
Institutional Form	Finance	Request for Chartfield Action - Budget Period	Support to create Budget Period	Modifies chartfields
Institutional Form	FCM	Project Funding Agreement	and F/CM	Support for budget and equity transactions
Institutional Form	Finance	Program Action Form	Support to create programs	Modifies chartfields
Institutional Form	HR	HR Access	Approves systems access	Security access
Institutional Form	OCA	Delegation of signature authority	Authorizes delegation of signatures	Indirect
Institutional Form	Finance	Cash deposit Form	Recording cash deposit	Support for deposit
Institutional Form	Finance	Concur Non-Employee Set Up	Approves Concur access	Concur access
Institutional Form	HR	Job Analysis Questionnaire	Reclassifies position	Support for ePAR
Institutional Form	HR	Non Tenure Track Reappointment	Authorizes ePAR	Support for ePAR
Institutional Form	HR	Personnel Data Form	Obtains new employee information	Support for information entered
Institutional Form	HR	Request for Additional Compensation	Authorizes additional comp ePAR	Support for ePAR
Institutional Form	Finance	Foreign National Information Addendum	Recording whether a person is a foreign national or not.	Indirect
Institutional Form	UA	Gift Transmittal forms (multiple)	Support for entry of a gift to Advance	Support for recording revenue
Institutional Form	Finance	Cost Center Action Form	Support to create cost center	Modifies chartfields
Institutional Form	OCA	Contract Cover Sheet	Provides contract informaton	Indirect
Institutional Form	OCA	Recommendation for Award	Provides support for vendor selection	Indirect
Institutional Form	Finance	Fund Balance Revenue Form	To request to budget New Revenue/Fund Balance	Revenue/Fund Balance
Institutional Form	HR	Catalyst Invoices	Obtains documentation of approval to record training costs	Support for transaction

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Institutional Form	Finance	Finance Access	Approves systems access	Security access
Institutional Form	Finance	Employer Provided Vehicle - Form A	When employee receives vehicle, documents type, date, FMV, etc...	Required Tax Information
Institutional Form	Finance	Employer Provided Vehicle - Form B	When employee returns vehicle, documents business vs personal use	Required Tax Information
Institutional Form	Finance	Exhibit B	Taxable Payments or Reimbursements to Employees	Support for reimbursement
Institutional Form	Finance	Gift Card Request Form	Documents gift card understanding	Support for payment
Institutional Form	Finance	Official Functions Form	Documents approval for official functions	Support for transaction
Institutional Form	Finance	Encumbrance Adjustment Form	Approves adjustment of encumbrances	Support for encumbrance change
Institutional Form	Safety	COOP Plan Forms	Approval of COOP plans	None
Institutional Form	Finance	Sole Source Form	Provides support for non-competitive procurement	Indirect
Institutional Form	Finance	Addendum C >100K	Provides approval for large cost items	Indirect
Institutional Form	HR	Fitness Release Form	Authorize fitness release time	None
Institutional Form	Finance	Revenue Contracts Over \$50,000 Form	Obtains approval / denial for revenue contracts	Support for contract
Institutional Form	UA	Foundation Payment Request Form	Approves payment	Support for payment
Institutional Form	Chanc/Pres	Professional Development Form	Approves payment	Support for payment
Institutional Form	HR	College Release Program Form	Authorize college release time	None
Institutional Form	Finance	T-Card Application	Authorizes T-Card for employee	Issue T-Card
Institutional Form	Finance	P-Card Application	Authorizes P-Card for employee	Issue P-Card
Institutional Form	Finance	Addendum A	Authorization for Moving and Relocation Expenses	Support for reimbursement
Institutional Form	Finance	Request of Authority to Remove Property from Campus	Authorize removal of property from campus	None
Institutional Form	Finance	Asset Update Form	Updates asset information	Modifies asset data
Institutional Form	Finance	Designation of Property Custodian Form	Designates Property Custodian	None
Departmental	UHCL	Receiving Report	Acknowledges receipt of goods	Support for payment
Departmental	UHCL	Postal Expenditure	Approves postage	Support for payment
Departmental	UHCL	Travel Authorization	Authorizes travel	Support for encumbrance
Departmental	UHCL	Travel Expense Report	Documents travel costs	Support for payment

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Type	Division	Form Title	Form Action	Financial, HR, CS, Security Action
Institutional Form	UHCL Finance	IDT Forms	Authorizes payment for bookstore, copy center, FMC services	Support for payment
Institutional Form	UH	MAPP/SAM Policy Exception Form	Authorize policy exception	Support for payment/contract
Institutional Form	UHV Finance	Authorization of Delegated Departmental Purchaser	Authorizes Department Purchases	Orders products
Institutional Form	DOR	Grant Cost Transfer Justification Form	Provides explanation of cost transfers	Support for transaction
Institutional Form	UHPD	Request for Police/Safety Services	Approval for payment to UHPD for billable services	Support for transaction
Institutional Form	UHV Finance	Business Expense Reimbursement	Approve payment	Support for payment
Institutional Form	Finance	Certifying Signature	Documents allowed signatures	None
Institutional Form	DOR	Participant Cost Forms	Recording participant cost	Support for transaction
Institutional Form	UHV HR	Employee Request for Alternative Work Schedule	Authorize alternate work schedule	None
Institutional Form	Finance	CoogPlan Access Request	Approves Coogplan access	Systems Access
Institutional Form	HR	Propel Invoices	Obtains documentation of approval to record training costs	Support for transaction
Institutional Form	UHCL Finance	Cell Phone Allowance Form	Authorizes additional comp ePAR	Support for ePAR
Institutional Form	Academic Affairs	Faculty Costing Sheet	Document start up packages for new faculty hire	Indirect
Institutional Form	UA	Endowment Transfer Form	Transfer funds between endowments	Transfers funds
Institutional Form	OCA	Contracts	Routes contracts for editing and approval	Indirect
Institutional Form	Finance	P-Card and T-Card Expense Log	Approves expenses	None

**Note:** Highlighted forms are being considered for the initial testing with DocuSign.